

**TORQUE**  
SOFTWARE

Lighthouse User Guide  
Surveys & On-Line Training

Version 6.0.6



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# RESPONDING TO SURVEYS

Your organisation may require you to participate in a number of different types of surveys. The FMCS provides the following types of surveys;

- Compliance Surveys (containing questions regarding Non-Compliance)
- Assurance Surveys
- General Surveys.
- On-Line Training

This section will assist you in how to access, respond and submit all of these types of surveys.

Note - FMCS has a facility to deliver on-line training using survey functionality. Online training comprises a tutorial video (or other relevant media) followed by a series of questions relating to the tutorial that the participant must provide a response to. The steps required to create an online training tutorial are similar to those required to create a general survey, therefore instructions on how to create an online training module will be included in the Creating and Administering a Survey section.

## Who Creates and Administers the Survey?

Surveys are created and administered by Survey Administrators. Users are given permission to be Survey Administrators by the Survey Module Administrator. Note: Survey Module Administrators are able to administer any survey.

Survey Administrators are responsible for:

- Designing the Survey
- Giving users required level of permissions to manage their staff's survey responses,
- Setting the workflow rules and what emails are sent to which users,
- Collating the finalised Survey,
- Recording and Reporting results of the Survey.

## Accessing the Survey

The Survey Administrators may send emails to notify survey participants that there is a Survey to be completed. This email may contain information about the survey including the closing date and a hyperlink to the Survey. The Survey Administrator may also send out reminder emails from time-to-time to users who are yet to complete the survey.

There are three ways to access the Survey:

1. If you have been invited to a survey you will usually receive a notification email containing a hyperlink to the survey. Click on the hyperlink in the email and you will be taken directly to the survey, or

2. Select the Survey through your FMCS Home Page by clicking on the relevant Survey Tile and then selecting the appropriate Survey from your In-Tray, or
3. Selecting the Survey option from the In-Trays menu from top of screen and then selecting the appropriate Survey from your In-Tray.

**Note:** The status of all Surveys are displayed on the right of the screen:

Resume


These are surveys that have been started, but not submitted.

Undertake

These are surveys that have not been started.

## Responding to a Survey

Once you are in the survey, you will be presented with the informative text (preamble) that was configured to describe and provide necessary information about the survey. Below this you will be presented with a series of questions to complete.

You may find Help icons  in some questions. Click on these icons for further explanation and help on that question.

Some questions may give you the option **Clear selected answer** button. This allows you to de-select all responses to the question.

At any time you can Save the Survey as draft. This allows you to save your work, close it, and return to continue the survey at a later time. Select the **Save Draft** button.

Note: Once the Survey Administrator closes the Survey you will no longer be able to continue to work on it. It will no longer appear in your In-Tray.

You can print your survey at any time by selecting the **Print** icon located on the FMCS toolbar.

## Responding to Non-Compliance Questions in a Survey

Your survey may contain **Non-Compliance** questions. Non-Compliance questions help capture Non-Compliances not previously reported over the course of a given period. The questions prompt users to consider if their actions have been in accordance with the agency's legislative and policy framework.

### What happens if you know of a Non-Compliance related to a question?

If you know of a Non-Compliance related to a question, answer it accordingly. If any Non-Compliances have already been recorded relating to this question it will be displayed in a grid below the question. All previously recorded Non-Compliances that match the following rules will be displayed if any of the following relate to you only for the set period and requirement;

- you are involved in the Non-Compliance in any of the following capacities:
  - Committer of the Non-Compliance

- Supervisor nominated in the Non-Compliance report
  - Have edited or updated the Non-Compliance report
- You are the current supervisor of the organisation unit nominated in the Non-Compliance
- You are the current supervisor of an organisation unit at a higher level to the organisation unit nominated in the Non-Compliance
- Permission has been given to survey participants to view Non-Compliances where the organisation unit in the Non-Compliance is the same as your current organisation unit
- Permission has been given to survey participants to view Non-Compliances where the organisation unit in the Non-Compliance is below your current organisation unit
- you have been given specific reporting permission to the organisation unit in the Non-Compliance, or;
- the Non-Compliance is viewable by anyone who you are the Survey Manager for.

If the Non-Compliance you know about does not appear in the listed Non-Compliances click on **Click to Add Non-Compliance** button. You will be taken to the Non-Compliance Reporting screen where you can enter all the relevant information. See [How to Report a Non-Compliance](#) section for instructions. However, note when submitting a Non-Compliance during a survey you will not be able to save draft or allocate the Non-Compliance to others.

## How to Submit the Survey

Once you have completed the questions you are ready to Submit the Survey.

1. Click on the **Submit** button.
2. If any mandatory questions are not completed an error will be displayed.
3. Questions requiring completion will have a red banner displayed under them.
4. Complete all marked questions and **Submit** the Survey again.
5. If a Declaration box appears, read the declaration. By selecting the **I Agree** button, you are agreeing to the declaration and your survey will be submitted.
6. A Confirmation message will appear to inform you the operation is complete.
7. Your survey will now be locked and the Survey will now appear in the "Completed" section of your In-Tray.

## Delegating a Survey

Delegating a survey allows you to ask someone else to complete your survey on your behalf.

You will only be able to Delegate if you have been given permission by the Survey Administrator. Your Survey screen will have a **Delegate** button at the bottom of the screen.

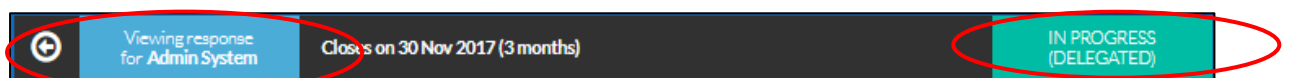
1. Select the Delegate button to send the survey to another person.
  2. Click on the **Search** icon.
  3. Enter part, all of the users name and select the **Search** button.
  4. Click on the Delegate's name.
  5. Select the **Delegate** button.
  6. A confirmation box will appear.
  7. The survey is now open to the Delegate to respond.
  8. Once delegated, only the delegated person may update the survey. The delegated person can also [Manage Participants](#) on behalf of the originator as well.
  9. While the survey originator cannot update the survey while it is delegated, they can, however, continue to [Manage Participants](#) responding to them.
  10. When the delegate competes and submits the survey, it will be returned to the originator for final review and submission.
- Note:** A Delegate cannot submit the survey on behalf of the originator. Only a Proxy can submit survey on behalf of the originator. See [Proxy](#) for more details.

## Cancelling a Survey Delegation

If you have delegated a survey and wish to cancel the delegation, you can select **Cancel Delegation** button at any time. This will cancel the delegation and reopen the survey for you to edit.

## Responding to a Delegated Survey

If a survey has been delegated to you, you will see the messages circled below when you open the delegated survey.



As the Delegate you can now perform the same functions as the person who delegated the survey to you.

1. If you select the **Save Draft** button you remain the Delegate and can return to the survey again.
2. You will only be able to Submit the survey if it is completed. Attempting to Submit an incomplete survey will result in an error message.
3. Select the **Submit** button, a confirmation box will appear. Select the appropriate response. If you choose to Submit the survey it will return to the originator.
4. Confirmation will appear.
5. The Survey will return to the originator's In-Tray for their review and Submission.

## Survey Managers

A survey manager is a person in the organisational structure who is participating in the survey that also has lower level participants in the organisational structure participating in the same survey. Survey Managers have been given additional permissions in the system to facilitate the management of participants reporting to them in a survey. They may have all, or only some, of the additional functions described below.

Survey Managers can;

View, monitor and grant permissions to other participant's surveys.

**Note:** Survey Managers will only be able to see those functions that they have been given permission to use.

### How to view, monitor and grant permissions to the Participants you Manage

- a) Navigate to the survey via your 'In-Tray' and click on the Survey type option (eg 'Compliance Surveys'). Note: This option is only available if you are a participant of the survey. Surveys that you have access to manage will be displayed. Click on the **Administer** button of the relevant Survey,

The screenshot displays the 'General Surveys' section of a software interface. At the top, there is a header 'General Surveys' with a 'View All' button. Below this is a section titled 'Requiring My Action' with a 'collapse' link. This section contains two survey items:

- Living-away-from-home Declaration 2016/17 FBT Year**: Includes a description and two buttons: 'Administer' (grey) and 'Resume' (blue).
- 2016-17 Financial Compliance Information Letter**: Includes a description and two buttons: 'Administer' (grey, circled in red) and 'Undertake' (blue).

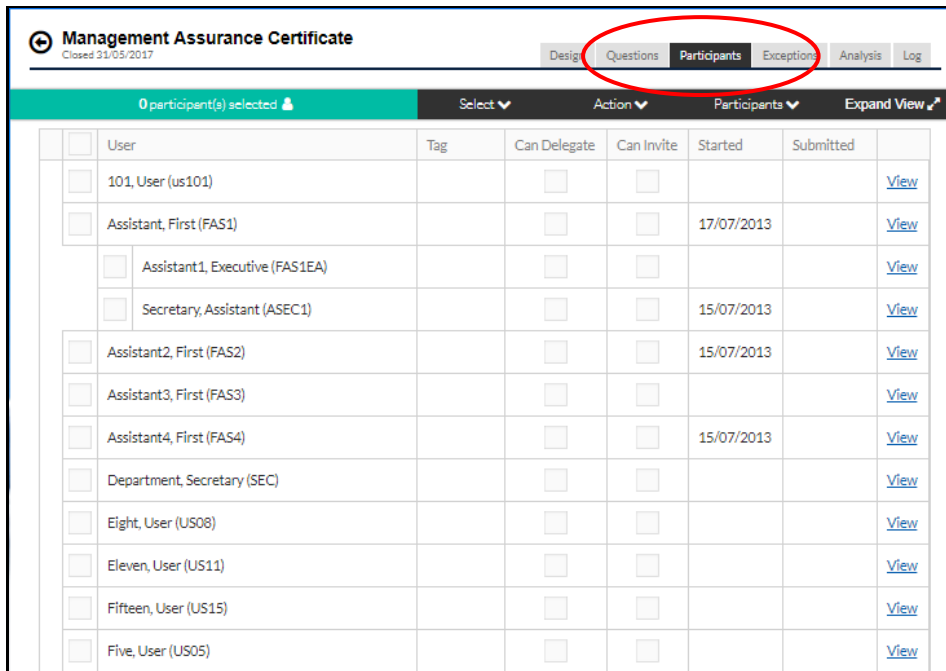
Below the 'Requiring My Action' section is a 'Complete' section with a 'collapse' link. It contains three survey items, each with a checkmark icon and two buttons:

- Management Assurance Certificate**: Includes a description and two buttons: 'Administer' (grey) and 'Review Survey' (blue).
- OH&S Awareness Survey**: Includes a description and two buttons: 'Administer' (grey) and 'Review Survey' (blue).
- Financial Compliance Information Letter 2013 -14**: Includes a description and two buttons: 'Administer' (grey) and 'Review Survey' (blue).



- b) Select the Participants open below to display the list of participants selected for this survey.

Shown below is the Participants screen.



<input type="checkbox"/>	User	Tag	Can Delegate	Can Invite	Started	Submitted	
<input type="checkbox"/>	101, User (us101)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Assistant, First (FAS1)		<input type="checkbox"/>	<input type="checkbox"/>	17/07/2013		<a href="#">View</a>
<input type="checkbox"/>	Assistant1, Executive (FAS1EA)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Secretary, Assistant (ASEC1)		<input type="checkbox"/>	<input type="checkbox"/>	15/07/2013		<a href="#">View</a>
<input type="checkbox"/>	Assistant2, First (FAS2)		<input type="checkbox"/>	<input type="checkbox"/>	15/07/2013		<a href="#">View</a>
<input type="checkbox"/>	Assistant3, First (FAS3)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Assistant4, First (FAS4)		<input type="checkbox"/>	<input type="checkbox"/>	15/07/2013		<a href="#">View</a>
<input type="checkbox"/>	Department, Secretary (SEC)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Eight, User (US08)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Eleven, User (US11)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Fifteen, User (US15)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>
<input type="checkbox"/>	Five, User (US05)		<input type="checkbox"/>	<input type="checkbox"/>			<a href="#">View</a>

**Note:** To go back to your survey click on the back arrow at the top left of screen at any time.

### Compress (Expand) View

Toggle the **Compress View (Expand View)** button to show less or more details for participants.

### View Exceptions

An exception is an answer that differs from the standard responses in a survey. Survey administrators can configure questions to trigger exceptions when a particular response is selected against a survey question. The 'Exceptions' tab shows all exceptions logged within a response. A survey manager can view all exceptions.

Click on the **Exceptions** tab to see all those participants who answered any question with an answer that indicates an exception.

Note: The Survey Administrator sets up the exception indicators.

### Adding Participants to Manage

You can add individuals to your Management list, or parts of the Organisational Structure.

Select the Participants Menu to access the options below.

**Add Participant** – Allows one person at a time to be added to the list of participants to be managed.

1. Start typing the users name in the Search field and select Search.
2. Click on the appropriate user's name.
3. By ticking the box **Set current Supervisor as Manager** allows the default Supervisor from the uploaded Organisation Structure to be set.
4. If the user has been added correctly, you will receive a confirmation message.
5. Optionally enter a tag – The Tag field is used to uniquely identify all surveys for a single participant.
6. Optionally enter a message – Enter a personalised message to be provided for each survey response. This message appears between the survey at the top of the survey preamble and the first question.

The participant will now appear in your list of Participants to Manage, and they will be added to the count of participants on the front of your survey.

If they have already been invited to participate in the Survey by another user, you will receive a message informing you, and you will not be able to invite them.

You may Delete Participants by contacting the Module Administrator.

**Add Organisation Structure** – Allows whole sections of the Organisation Structure to be added to the participants list to manage. Drill down to children groups of the structure by clicking on the arrows next to the name of the group. Select one or more appropriate areas to add. By ticking the box **Set the current Supervisor as Survey Manager** allows the default Supervisor from the uploaded Organisation Structure to be set.

**Import** – Allows a list of participants in CSV file format to be uploaded.

Tip: click on the text **Download a sample import file here** to see a sample file.

**Export** – Allows selected participants, or organisation groups, to be downloaded in CSV file format.

### Selecting Groups of Participants

You can select individual users by clicking on the box next to their name.

You can also select groups of participants by clicking on the **Select** menu.

The select function provides a drop-down list of groups that can be selected:

- All – All participants
- None – Deselects All participants
- No invitation sent – selects all participants that have not been sent an invitation email
- Submitted – Participants who have completed and submitted their survey

- Not Submitted – Participants who have not submitted their survey
- In Progress – Participants who have started but have not submitted their survey
- Not Started – Participants who have not started the survey at all.
- Select lower levels – If this is checked, when a person is selected, any participants they manage will also be selected.

**Note:** Selecting participants from the Select button is cumulative: that is, you can Select multiple groups such as “Incomplete” and “Not Started”.

## Other Actions

Once you have selected your participants, there are several actions that can be carried out by accessing the **Action Menu**.

The screenshot shows the 'Motor Vehicle usage copy' survey interface. The 'Participants' tab is active, and two participants are selected. The 'Action Menu' is open, listing the following actions:

- Send Email
- Send Invitation
- Send Reminder
- Assign Can Delegate
- Unassign Can Delegate
- Assign Can Invite
- Unassign Can Invite
- Set Open & Close
- Change Owner
- Set Tag & Message
- Assign Delegate
- Remove Delegate
- Assign Proxy
- Remove Proxy
- Add Supervisor as Participant
- Assign Manager
- Set Supervisor as Manager
- Remove Manager
- Reopen Responses
- Clear Responses
- Delete Participant

Depending on the level of permissions a Survey Manager has been given, you may see some, or, all the Actions described below.

- **Send Email** – Allows an email to be generated to the selected participants. There may be several email templates available to choose from if the Survey Administrator has created them.
- **Assign Can Delegate** – Gives permission to a user you manage to Delegate their survey to someone else to complete. Only available if you yourself have Delegate Permission.

- **Unassign Can Delegate** – Withdraws permission for a user you manage to Delegates their survey to someone else to complete. Only available if you yourself have Delegate Permission.
- **Assign Can Invite** – Gives permission to a user you manage to Invite others to the survey. Only available if you yourself have Invite Permission.
- **Unassign Can Invite** – Withdraws permission to a user you manage to Invite others to the survey. Only available if you yourself have Invite Permission.
- **Reopen Responses** – Allows the Manager to reopen a participant’s survey for editing by the participant.
- **Delete Responses** – Allows the Manager to delete all responses to the participant’s survey, allowing the participant to start again.

### Description of the Columns in the Participants Screen

User	Tag	Message	Classification	Organisational Structure	Can Delegate	Delegated To	Can Invite	Proxy	Open	Close	Notified	Last Reminder	Reminded
Burton, Krista (FAS3)			SES1	Division3	<input checked="" type="checkbox"/>		<input type="checkbox"/>						0
Ford, Lynne (AS4)			EL2	Branch4	<input type="checkbox"/>		<input type="checkbox"/>						0
O'Brien, Gina (US01)			EL1	Section1	<input type="checkbox"/>		<input type="checkbox"/>						0
Perry, Ella (US15)			EL1	Section5	<input type="checkbox"/>		<input type="checkbox"/>						0
Schultz, Hubert (US19)			AS05	Section7	<input type="checkbox"/>		<input type="checkbox"/>						0
Lopez, Alexander (US13)			AS06	Section4	<input type="checkbox"/>		<input type="checkbox"/>						0
Morgan, Melissa (US14)			AS04	Section5	<input type="checkbox"/>		<input type="checkbox"/>						0
Phelps, Maryann (FAS1)			SES3	Division1	<input checked="" type="checkbox"/>		<input type="checkbox"/>						0
Curtis, Emanuel (FAS1)			AS05	Division1	<input type="checkbox"/>		<input type="checkbox"/>						0

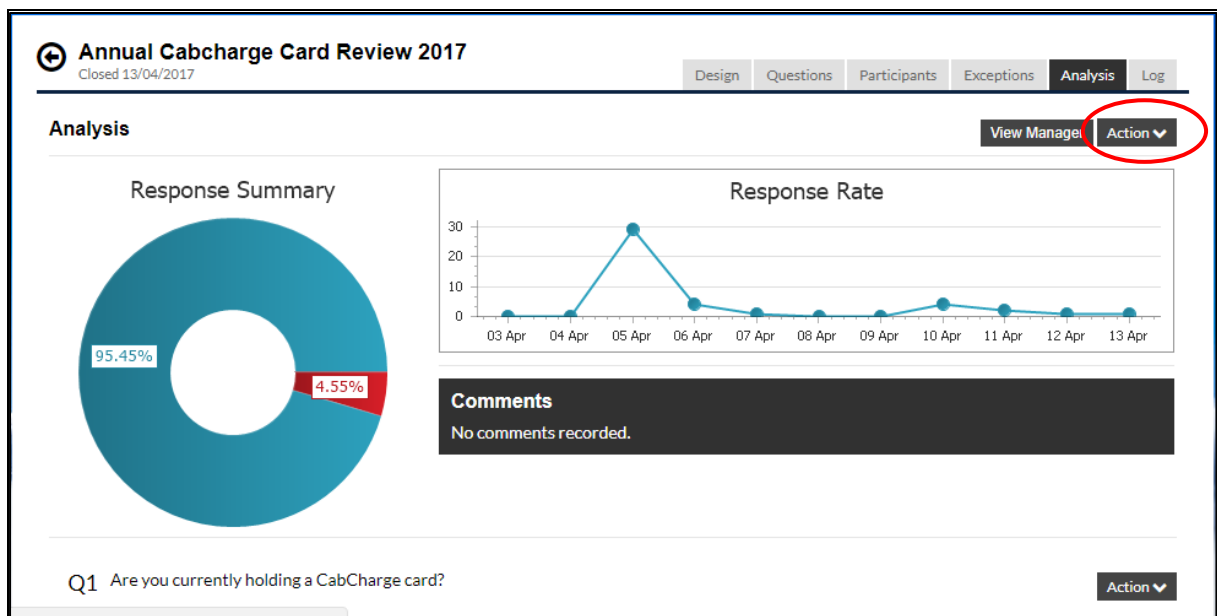
**Note:** Show all columns or hide columns by toggling the **Compress/Expand View** button.

- User: Name and login of users to Manage.
- Tag: The Tag field is used to uniquely identify all surveys for a single participant.
- Message: A personalised message can be provided for each survey response. This message appears between the survey at the top of the survey preamble and the first question
- Organisational Structure: Where in the Org Structure the user comes from.
- Can Delegate: Tick indicates the user has been given permission to delegate their survey.
- Delegated To: The name of the user the participant has delegated their survey to.
- Can Invite: Tick indicates the user has been given permission to invite other participants to the survey.

- Proxy: The name of the user who may complete the survey on the participant's behalf. Only Module Administrators can create a Proxy.
- Open: This date overrides the survey open date just for the selected participant.
- Close: This date overrides the survey close date just for the selected participant.
- Notified: Date the user was originally notified about the survey.
- Last Reminder: Date the user was most recently reminded to complete the survey.
- Reminded: The number of times the user has been reminded to complete the survey.
- Started: The date the user began the survey.
- Submitted: The date the user submitted the survey.
- View: Once a participant has started their survey, the Manager can view the survey by clicking on the "View". Note: editing of other participant's survey is not permitted.

## Analysis of Survey

Navigation: Manage > Survey type > Action > Analysis



The Analysis Screen provides reports on the Manager's participants. These reports are sub-sets of the main reports. Please see Section on [Analysing the Results of a Survey](#) for tailoring the reports.

# CREATING AND ADMINISTERING A SURVEY

## (Administrator Function only)

You will only be able to administer a survey if you have been given permissions as a:

- Module Administrator, or
- Survey Administrator

If you are the creator of a survey you will automatically be given permission as the Survey Administrator for the survey.

This section will describe the processes required to create, design, manage, report and analyse any type of survey including a compliance survey.

### Creating a New Survey

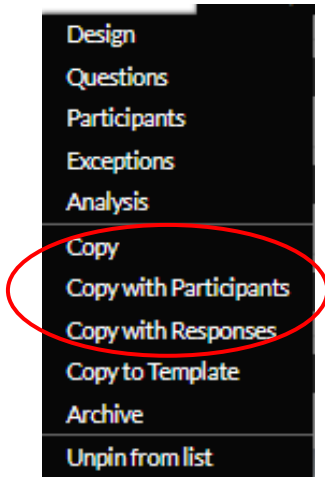
You can create surveys if you have been given permission to create surveys.

There are two ways to create a new survey:

1. **Copy an existing Survey**  
Copying an existing survey will copy all data from the selected survey including: questions, participants, permissions, workflow settings, email templates etc. Modifications can be made to a copied survey.
2. **Create a Blank Survey**  
This method will provide a blank template to build from. Only those settings defined by the System Administrator will be prefilled.

## Copy an Existing Survey

1. Navigate to: Manage > Survey type (eg Compliance Survey)
2. Select the **Action** button next to the survey required to copy. **Copy** will only copy the survey configuration. **Copy with Participants** will copy the survey configuration and all participants. **Copy with Responses** will copy the survey configuration and all participants and their responses.



3. A confirmation screen will appear. Select OK.
4. The Survey Administrator may now work through the survey to edit as required.

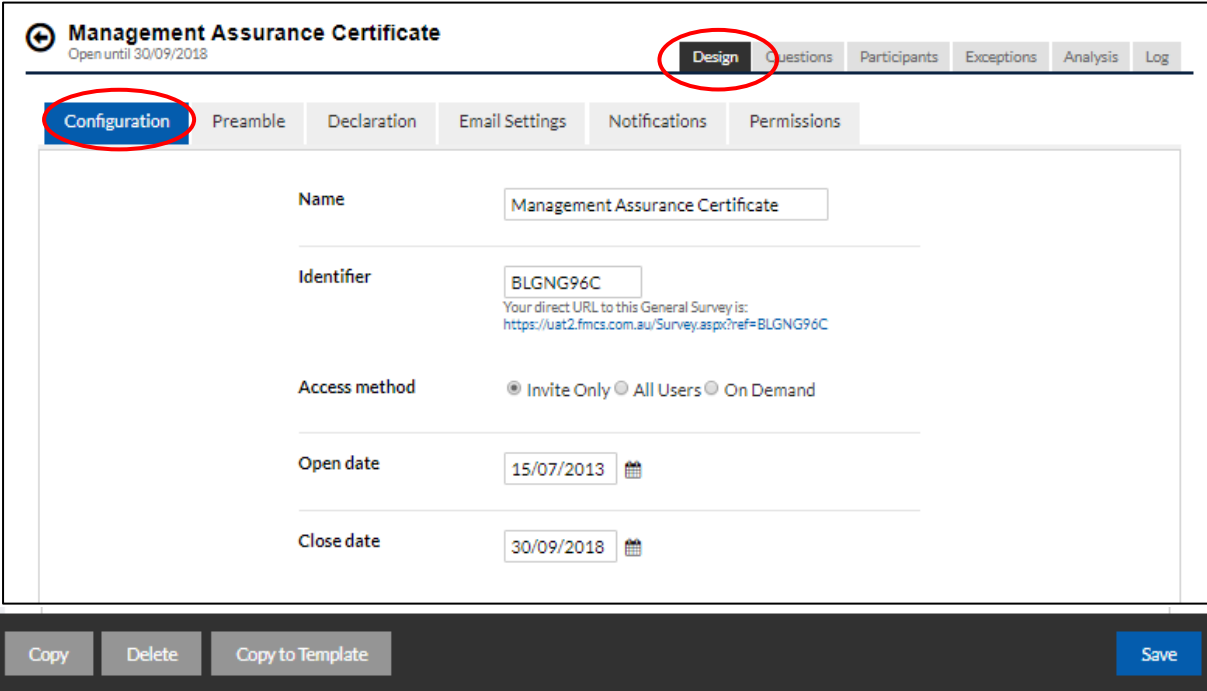
## Create a Blank Survey

1. Select: New > Survey Type (eg Compliance Survey) OR  
A blank survey will be created to begin working in.

## Configuring a Survey

To configure a survey, Open the Survey, Click the **Design Tab** then click the **Configuration Tab**.

The **Save**, **Copy** and **Delete** buttons can be used at any time throughout the survey designing process.



The screenshot shows the 'Management Assurance Certificate' survey configuration interface. At the top, the title 'Management Assurance Certificate' is displayed with a sub-header 'Open until 30/09/2018'. A navigation bar includes tabs for 'Design', 'Questions', 'Participants', 'Exceptions', 'Analysis', and 'Log'. Below this, a sub-navigation bar shows 'Configuration', 'Preamble', 'Declaration', 'Email Settings', 'Notifications', and 'Permissions'. The main configuration area contains the following fields:

- Name:** Management Assurance Certificate
- Identifier:** BLGNG96C. Below this field, it states: 'Your direct URL to this General Survey is: <https://uat2.fmcs.com.au/Survey.aspx?ref=BLGNG96C>
- Access method:** Radio buttons for 'Invite Only' (selected), 'All Users', and 'On Demand'.
- Open date:** 15/07/2013 with a calendar icon.
- Close date:** 30/09/2018 with a calendar icon.

At the bottom of the screen, there are buttons for 'Copy', 'Delete', 'Copy to Template', and a prominent blue 'Save' button.

The Configuration screen allows you to define key details relating to the survey like name, period of operation and general display.

Below is a description of the fields in the Configuration screen for the new Compliance survey. If you have copied it from a previous survey the fields will be pre-filled the same as the original survey, except for the Identifier number. Edit these fields as appropriate.

**Name:** This is the name of the survey all users will see in their In-Trays.

**Identifier:** an autogenerated code that uniquely identifies this survey, allowing a direct URL for access.

**Access Method:** defines how the survey is accessed by participants. Options are:

- Invite Only – participants must be explicitly invited by the administrator by adding them to the participants section of the survey
- All Users – All users will be able to respond to the survey and the survey will appear in all user's in-trays.
- On Demand – Users may select to perform the survey from the New menu. If this option is selected, the following is also available;



<b>Access method</b>	<input type="radio"/> Invite Only <input checked="" type="radio"/> All Users <input type="radio"/> On Demand
<p>Note: The menu option for this on-demand item is managed by the system administrator via menu management in system settings. Contact the system administrator to request this item to be included as a menu option.</p>	
<b>Allow participant selection</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<p>Allows requesting user to create a survey on behalf of another participant. The requesting user will be set as the delegate for the selected participant's survey.</p>	

**Allow Participant Selection** – Allows users to create surveys/training on behalf of another user.

**Note:** On demand surveys/training are not automatically included as a menu option. Menu options for on demand surveys/training are configured by the system administrator via the menu management function.

**Open date:** the date this survey will become available to participants.

**Close date:** the date this survey will no longer be available for response submission.

**Period:** the reporting period this survey is attached to. This is required if any question in the survey will be a Non-Compliance question. The Period restricts Non-Compliances shown in the response screen to only those reported against this period. See Section for [Non-Compliance Reporting periods](#).

**Participant can select organisation structure-** allows participant to select the organisation unit to be linked to the survey. Selecting “Never” will cause the participant’s organisation unit, as currently recorded in the system, to be selected automatically.

**Organisation Structure is mandatory** – If **Participant can select organisation structure** has been set to “Always” or “Only if Participant has no organisational structure recorded” the system will prompt “Organisation Structure is mandatory”. Checking this will prevent the participant from leaving the organisation unit blank.

**Display question numbers-** turn this off to hide question numbers (useful for conditional question flow).

**Restrict Manager Access-** switch this on to disallow survey managers from undertaking their own survey until all subordinates have submitted a response.

**Allow delegates to redelegate-** Permission can be given for survey delegates to redelegate to another delegate. This allows a survey to be passed between any number of people prior to final submission by the participant. See “Allow delegates to redelegate” option in survey configuration.

**Allow multiple responses-** Participants can be allowed to submit multiple responses to a survey. This is useful where one person may be responsible for submitting surveys for more than one subject or area.

**Archived**- only non-archived surveys will be available for participants.

Select the 'save' button.

## Setting up the Survey Preamble

The preamble is the text at the top of the survey that provides the participant with instructions on what to do and any other relevant information and is displayed when the survey is being responded to. Documents and videos can be uploaded to the preamble section of a survey.

For online training modules, a video of the tutorial is uploaded in this section.


Preambles are entered using a standard word editing function in the preamble tab. To set the wording for the survey Preamble, click on the **Design Tab** then the **Preamble Tab**.

**Design** – is the default view and allows you to add and edit the text in a standard MS word editor .


**HTML** – to select HTML, select the HTML tab at the bottom of the text editor. This option allows you to view the text in HTML format. Text in HTML format can be copied into this view.

**Preview** – to see how your preamble will appear on the survey select the 'preview' tab at the bottom on the text editor.

Upload a document:

1. Select the 'insert image' icon 
2. Select whether the document is being uploaded from a URL or from your computer
3. If from URL enter the URL, if from computer select the 'browse' button to select the file
4. Select the insert button.

Upload a video

1. Select the 'insert video icon' 
2. Select whether the video is being uploaded from a URL or from your computer
3. If from URL enter the URL, if from computer select the 'browse' button to select the file
4. Select the more options check box
5. Enter the width and height of the video that you wish to have the video displayed at.  
Note: if you don't know the width and height enter '940' in the width and the system will assign the correct height. The video size can be determined by viewing the video properties (right click on the video in file explorer > Properties > Details).
6. Select Preload mode to 'Auto' to load the first frame of the video when the survey / online training is opened by the user.

## Setting up the Survey Declaration

Survey Administrators can require participants to agree to a declaration before submitting a survey. This is optional.

To set the wording for the survey Declaration, click on the **Design Tab** then the **Declaration tab**.

The Require Declaration check box will default to no. It can be checked if required. Checking the require declaration box ensures that respondents must agree to the declaration before submitting their response.

**Design** – is the default view and allows you to add and edit the text in a standard MS word editor .

**HTML** – to select HTML,select the HTML tab at the bottom of the text editor. This option allows you to view the text in HTML format. Text in HTML format can be copied into this view.

**Preview** – to see how your preamble will appear on the survey select the 'preview' tab at the bottom on the text editor.

## Setting up Survey Email Notifications

To set up email notifications to be sent to participants for the survey Select the **Design Tab**, then the **Email Settings Tab**.

**Email notifications are managed over 2 tabs. Some email notifications can be scheduled for automatic sending. The schedule is controlled in the email setting tab. Whilst the actual notification email templates are managed in the 'Notifications' tab.**

**Notification reply to email**- allows you to nominate the reply address for any replies to survey emails.

**Auto Reminder schedule** – This function allows you to configure reminders to be automatically sent to participants who have not submitted their survey. Note: You must also ensure the 'Participant Reminder' notification in the 'Notifications' tab has been selected.

Reminders start – Checking if reminders are required will be performed on and after this date. If the Reminders start date is left blank reminder notifications for the survey will not be sent.

Cycle (days) – Enter the number of days between each email reminder notification. If the number of cycle days has passed since the last reminder to a participant, or there has been no reminder, a reminder notification will be sent.

**Subordinate Progress Emails**- This is used to send progress emails to the Survey Manager about the progress of their subordinate's surveys. Value selected in Cycle (days) must be > 0. Where no progress emails are required, set the date field to null. Ensure that 'Manager Subordinate Progress Notification' has been selected to 'Send email' in the 'Notifications' tab.

## Notifications

The Notifications tab allows you to manage the types and content of email notifications that are sent to survey participants.

The FMCS comes pre-configured with a standard list of notifications. Notifications can be turned off if not needed but new ones cannot be created.

Notification descriptions can be found by selecting the edit button next to the notification type.

To select a notification, navigate to Design > Notifications

1. Review the standard email notifications
2. To remove a notification, select the edit box for the required notification and uncheck the 'send email box'
3. To modify the notification, select the 'edit' button and make changes. Select the 'tick' button to save.

Modify a Notification:

When modifying a notification, any of the fields can be modified using text and / or one or many merge fields. A merge field is a predefined tag that when selected populates the relevant information into the notification email. For example, if you select 'Participant First Name' into the 'To Line' field the system will derive the participant's First Name to be used in the email notification.

To populate merge fields into the required field, select the Edit function at the end of the field. Merge fields are grouped into categories to make selecting them easier. The following list explains the merge fields:

**Recipient Fields:** Contain all the relevant fields that relate to the recipient of the email like Recipient First Name, Last Name, AGS Number, Organisation unit etc

**Participant Fields:** Contain all the relevant fields available that can be included for the participant eg, First Name, Last Name, AGS Number, login, email address, Org unit etc

**Survey Fields:** Contain all the relevant fields available that can be included for the Survey eg: Survey title, URL, tag, message etc.

**Delegate fields:** Contain all the relevant fields available that can be included for the delegate eg, First Name, Last Name, AGS Number, login, email address, Org unit etc

**Manager Fields:** Contain all the relevant fields available that can be included for the Survey Manager eg, First Name, Last Name, AGS Number, login, email address, Org unit etc

**System Fields:** Contain all the relevant system fields available that can be included Survey eg, System title, Org structure title, Supervisor title etc.

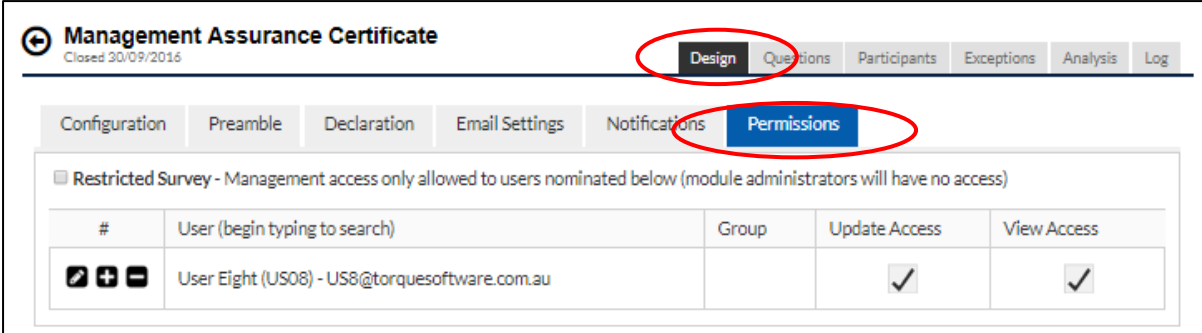
## Granting Survey Permissions to Others

The Survey Administrator can grant permission for participants to have Administrator or Read only (reporter) access.

**Update Access** – allows users to have permission to administer this survey.

**View Access**- are users who can access a read-only view of all survey management functions, including participants and analysis for this survey.

Select the **Design Tab**, then the **Permissions Tab**.



The screenshot shows the 'Management Assurance Certificate' interface. At the top, there is a navigation bar with tabs: Design, Questions, Participants, Exceptions, Analysis, and Log. The 'Design' tab is selected and circled in red. Below this, there is a sub-navigation bar with tabs: Configuration, Preamble, Declaration, Email Settings, Notifications, and Permissions. The 'Permissions' tab is selected and circled in red. Below the sub-navigation bar, there is a section titled 'Restricted Survey - Management access only allowed to users nominated below (module administrators will have no access)'. This section contains a table with columns: #, User (begin typing to search), Group, Update Access, and View Access. The table has one row with the following data:

#	User (begin typing to search)	Group	Update Access	View Access
	User Eight (US08) - US8@torquesoftware.com.au		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Use the [Grid Management buttons](#) to Add, Edit and Delete users. Once a participant has been selected to edit, simply check or uncheck the relevant box as Update access and/or View access.

Groups can also be given permissions for a Survey. Instead of adding an individual, click into the Group column and find the relevant group from the drop down menu.

To create new groups or edit existing groups see the Systems Administration and Global Settings Guide.

**Restricted Survey** – Restricts users who can access the survey's administration to only those users explicitly identified in the list of users with permission. If selected, even module and system administrators will not have access unless explicitly selected.

## Setting Survey Questions

Now that the survey has been designed, it needs to have questions added for participants to answer. This section allows you to configure your survey questions. You will be able to add new questions, modify existing questions and define the behaviour of these questions in this section.

Surveys can have any number of questions. New questions can be added, or Questions from your Question Bank can be selected.

Note: This manual provides information and instructions on all Question and Answer Types relevant to the General Survey Module. If your organisation is only operating the Non-

Compliance Survey Module, you will only be able to see the Non-Compliance Question and Answer Types in your FMCS.

The screenshot shows the 'Compliance Survey' interface with the 'Questions' tab selected. It features two questions, Q1 and Q2, each with a 'Yes/No' response type. A warning message indicates that editing questions is no longer possible due to existing responses. The 'Add Question' button is highlighted in red, and a 'Question Bank' is visible on the right side of the interface.

### Add a General Question

Click on the **Add Question** button.

**Title:** Enter an optional title for the question.

**Note:** Questions will be saved in the Question Bank grouped together by title.

**Question Text:** Type the question, using standard Microsoft Word editing features such as font, bullets, numbered lists, tables etc.

**Response Type:** Select the response type that best fits the question. To assist in obtaining consistent and quality answers, FMCS has a number of different response Types to select from.

**Note:** This manual provides information and instructions on all Question and Answer Types relevant to the Survey Module. If your organisation is only licenced to use the Compliance Survey Module, you will only be able to see the Non-Compliance Question and Answer Types in your FMCS.

Standard answer types in FMCS are:

1. **Non-Compliance (compliance surveys only)**  
Non-Compliance questions are specific to Compliance surveys only. When other survey types are being created the 'Non-Compliance' option is not displayed for selecting. Where 'Non-Compliance' is the selected response type the system will display all recorded non-compliances for the question to the survey participant where:

- the participant is involved in the non-compliance in any of the following capacities:
  - Committer of the non-compliance
  - Supervisor nominated in the non-compliance
  - Have edited or updated a non-compliance
- the participant is the current supervisor of the organisation unit nominated in the non-compliance
- the participant is the current supervisor of an organisation unit at a higher level to the organisation unit nominated in the non-compliance
- Permission has been given to survey participants to view non-compliances where the organisation unit in the non-compliance is the same as the participant's current organisation unit
- Permission has been given to survey participants to view non-compliances where the organisation unit in the non-compliance is below the participant's current organisation unit
- the participant has been given specific reporting permission to the organisation unit in the non-compliance, or;
- the non-compliance is viewable by anyone who the participant is the Survey Manager for.

2. [Short Text](#)

Allows a free text response with a small text box. Maximum characters can be set.

3. [Long Text](#)

Allows a free text response with a larger text box. Maximum characters can be set.

4. [Yes/No](#)

Allows only a Yes or No response.

5. [Single Select List](#)

The Survey Administrator defines the list, but only allows one answer to be selected.

6. [Multi Select List](#)

The Survey Administrator defines the list. Any number of items may be selected.

7. [Date Picker](#)

The date picker is displayed in the standard calendar selection format. Minimum and maximum date ranges can be defined if required.

8. [Numeric](#)

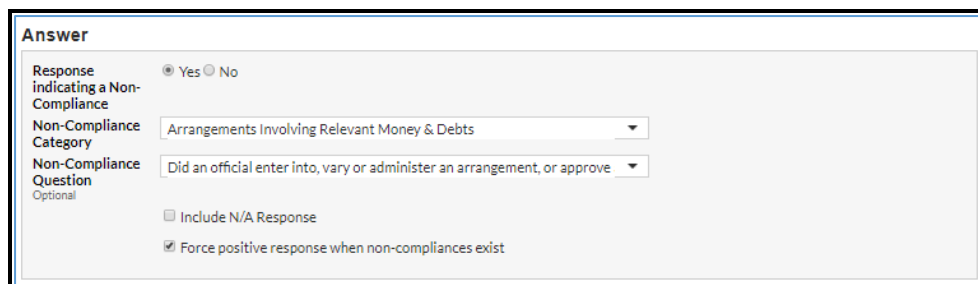
Minimum and maximum ranges can be defined if required.

9. [None: No response is required for the question.](#) This effectively allows the survey to be configured with section separators and other text only formatting.

## Answer Type Options

Depending on the answer type selected above, the system may ask you to provide further values to define the answer type. Any of the following options may be available for the Answer Type selected.

### Non-Compliance Answer type only (Compliance Surveys only)



The screenshot shows a configuration panel titled "Answer" with the following options:

- Response indicating a Non-Compliance:** Radio buttons for "Yes" (selected) and "No".
- Non-Compliance Category:** A dropdown menu with "Arrangements Involving Relevant Money & Debts" selected.
- Non-Compliance Question:** A dropdown menu with "Did an official enter into, vary or administer an arrangement, or approve" selected.
- Optional:**
  - Include N/A Response
  - Force positive response when non-compliances exist

1. **Response indicating a Non-Compliance:** This allows the person creating the survey to identify which answer (either Yes or No) indicates a non-compliance may have occurred. Questions can be asked in way that a Y may indicate a non-compliance and in others a N may indicate a non-compliance.
2. **Non-Compliance Category** – select the Category from a [predetermined list](#) set up by the Module Administrator.
3. **Non-Compliance Question** – select a Non-Compliance Question from a [predetermined list](#) set up by the Module Administrator from within the Category relating to a specific requirement from the financial framework. Non-Compliance Question is optional and is only required when the survey question relates to a particular requirement.
4. **Include N/A Response** – Provides an N/A response option. Note: an N/A response is treated the same as answering a non-compliance has not occurred.
5. **Force positive response when non-compliance exist** – When checked, the answer to questions where non-compliances are recorded will be forced to be answered with a the positive response.

**Note:** where a question already has non-compliances recorded for a participant, the question's answer will automatically be set to the positive response.

#### Include N/A response

Select this option to allow an N/A response when Yes/No Answer Type is selected.

#### Answer length

Limits the size of answer allowed.

#### N/A Response

Allows a Not Applicable response for Non-Compliance and Yes/No response types.



### Values

If a Single Select or Multi-Select answer type is chosen, enter one value per line. Tick the Allow 'Other' box if an additional text box is to be displayed if "Other" is chosen to allow further information to be added by the participant.

### Include Document Upload

Set the question to allow document upload to be optional or mandatory depending on the answer provided.

### Capture Additional Information

Set the question to request further information to be provided to be optional or mandatory depending on the answer provided.

### Record Exceptions

Set the survey to flag an answer as an "Exception". Exception responses have special reporting features.

### Correct answer required


Set this answer to a predetermined response before the participant can proceed. Often used for creating training review type questions.

### Required Answers

An answer can be made Mandatory by selecting the *Require an answer*.

### Prerequisite

The question is only displayed if the appropriate answer is provided in the selected prerequisite question. (Not available for Question 1.)

Help  can be included for each question including hyperlinks to internal or external sources.

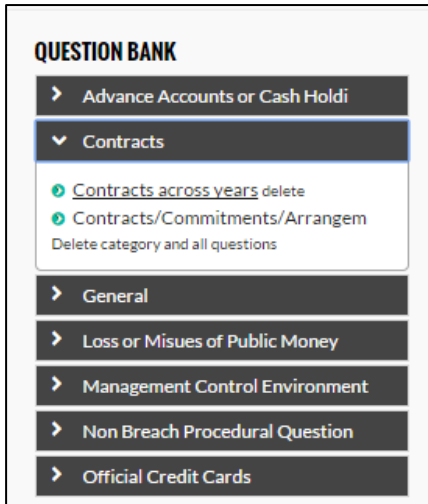
Note: You will not be able to change the answer type if one or more participants have responded to the question.

Note: The options for Answer Type depend on the modules your agency has implemented. You may not have access to all Answer Types shown above.

## Questions from the Question Bank

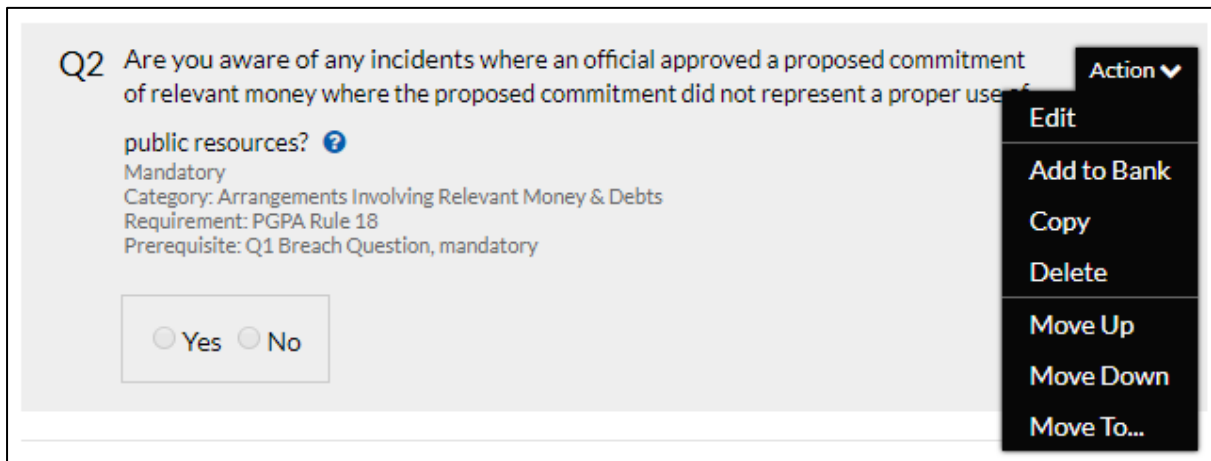
### Using Questions from the Question Bank

Questions that have been saved to the Question bank can be quickly added to other surveys by selecting them from their category heading.



### Adding and deleting Questions in the Question Bank

To add questions to the question bank select the **Action** tab to the side of the question and selection the **Add to Bank** option.



To delete questions from the question bank, click on the “delete” text next to the question.

**Note:** The Question Bank belongs to your agency. Any editing you do to the Question Bank will affect all Survey Administrators in your agency.

### Managing Questions

By selecting the **Action** tab to the right of a question, there are several actions you can take to change questions that have been saved into a survey.

**Edit:** Allows the question to be edited.

Insert a section break – A section can be configured by creating a question and selecting “None” in Response Type. This effectively allows the survey to be configured with section separators and other text only formatting.

**Add to Bank:** Allows this question to be added to the Question Bank. Adding a Category to the question will allow the questions to be grouped when displayed in the Question Bank.

**Copy:** Allows the question to be copied to the end of the survey.

**Delete:** Allows the question to be deleted from the survey.

**Move Up:** Allows this question to be moved up the order of questions in the survey.

**Move Down:** Allows this question to be moved down the order of questions in the survey.

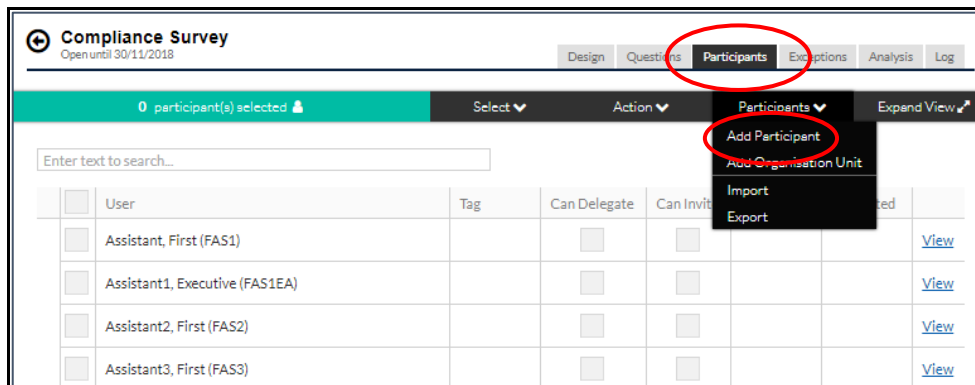
**Move To:** Allows this question to be moved to a specified number position in the survey.

### Exporting Questions

Questions can be exported to a csv file by selecting the Export Questions button on the Questions tab.

## Adding Participants to the Survey

If the survey has been created by copying a previous survey, all the participants will have been copied as well, including the permissions previously given.



If the survey has been created from **New** the participants screen will be empty.

Survey participants can be invited individually or in bulk.

### Adding Individual Participants

1. Select **Add Participant** from the Participants Menu.
2. Start typing the participant's name into the name field and select Search.
3. Click the participant's name from the list.
4. Tick the **Set current Supervisor as Survey Manager** box if you wish to set the Survey Manager as this participant's Supervisor. If this option is ticked the system will identify the first level supervisor from the Organisation structure of the participant and make the first level supervisor the survey manager for the participant. The first level supervisor will be added as a participant if required.

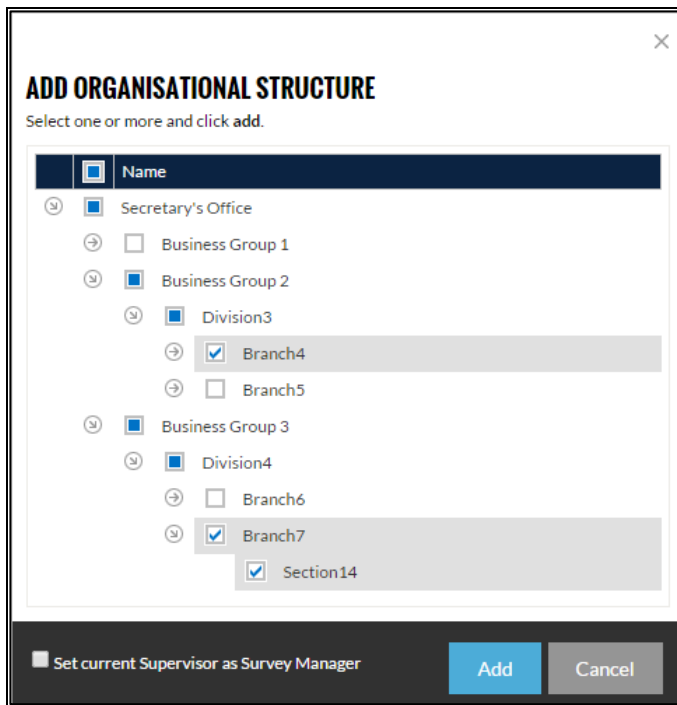
If the user has been added correctly, you will receive a confirmation message.

### Adding Participants by Organisation Structure

Use this function when you want to add all members from a particular part of your organisational structure as participants.

Multiple areas within the organisational structure may be selected.

1. Select **Add Organisation Structure** from the Participants Menu.



2. Tick and drill down to the required level of Organisational Structure to be selected. Multiple areas can be selected.
3. Tick the **Set current Supervisor as Survey Manager** box if you wish to set the Survey Manager as this participant's Supervisor.

If this box is not selected, the participant will not have a Survey Manager.

4. Select the **Add** button.
5. If the participants have been correctly added as participants, a confirmation box will appear.

### Adding Participants through Import

Where many participants are required to be added to the survey, whether this is to add initial participants to a new survey or additional participants to an existing survey the FMCS provides an import facility to make the process of adding participants more efficient. This is a 2 step process. First you will need to create or modify the import template and then upload the file.

#### Create the Import Template

If you already have a prepared import file then skip this step and go directly to the next step 'Import the participant file'.

1. Select Manage > Survey type > Action > Design > **Participants >Participants > Import**

**Import Participants** ✕

Please upload your .CSV file below.  
[Download your current participants in the correct format here.](#)

---

**Upload your Participant Import File**  
 Browse to your import file, then click Upload.

CSV import file  First row contains headers

Browse...

Upload

2. Select the 'Download your current participants in the correct format here' link. The FMCS will download an excel template in MS Excel. The template will be populated with all current survey participants. If there are currently no survey participants, the template will be empty.
3. If the survey does not yet contain any participants, populate the participant details starting on Line 2 in the excel template.
4. If you are importing additional participant, locate the next available row in the template and populate the additional participant details. Note: The current participants on the excel template do not need to be deleted as the FMCS recognises all existing entries and will only update changes to an existing record or insert a new record for each new participant added.
5. To modify entries in the template file, locate the desired record and manually make the update to the row. The FMCS contains a Unique ID for each participant record, therefore by updating data within a record (make sure you don't manually update the ID field) the system will accept the update and not duplicate the record.
6. Update the template with the participants – if you are adding participants to an existing list, the FMCS will populate all current participants into the template with each record being assigned a unique ID. This ID allows you to update any details for any participant and the FMCS will update the record instead of creating a new record.
7. Save the file. Note: the file will by default save to the downloads directory.

Now you are ready to import the participant list.

Import the participant list

1. Click the **Browse** button and select your CSV file. If you have a file prepared earlier then locate the desired file from the file directory. If you created the file as part of the last step the file will stored in the downloads directory and will be the last file created.

**Note:** Only participants who are already recorded as users in the system may be uploaded.

2. Select the **Upload** button.
3. A partial sample of the import will be displayed. If this is correct. Select the **Import** button.
4. A confirmation will be appear noting the import has been successful. **Note:** any import rows with an error will be ignored.

## Exporting Participants

You can export a list of some or all of the participants you manage by using the **Export** option from the **Participants Menu**. This can be used to print a list of participants.

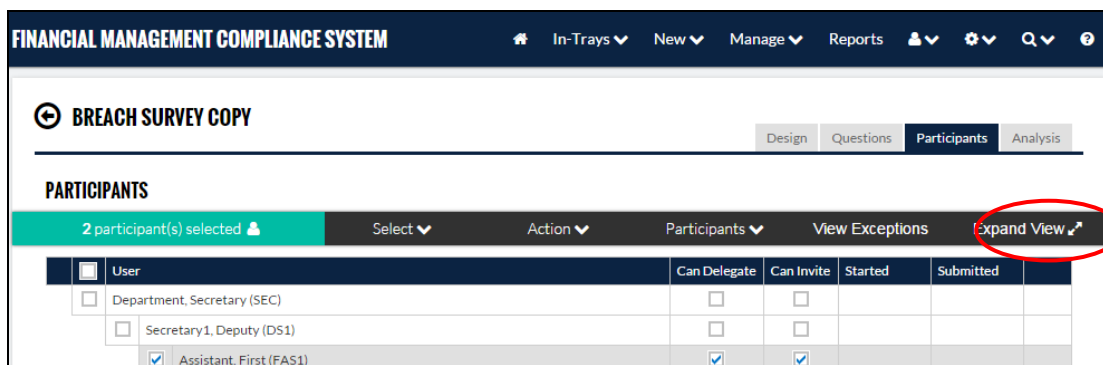
1. Select the participants to export by either selecting them individually or by group from the **Select** Menu.
2. Select the **Export** option from the **Participants** Menu.
3. A CSV file is generated.
4. Open and save or print the CSV as required.

## Managing Survey Participants

Participants are managed through the Participants screen. They can be invited to the survey, given various levels of management permissions, responses monitored and bulk emails can be sent.

Note the different views available to management participants. By toggling the **Expand/Compress View** buttons you can view the full or compressed screen.

Compressed View



The screenshot shows the 'FINANCIAL MANAGEMENT COMPLIANCE SYSTEM' interface. The main header includes navigation options like 'In-Trays', 'New', 'Manage', 'Reports', and user settings. The current page is titled 'BREACH SURVEY COPY' and has tabs for 'Design', 'Questions', 'Participants', and 'Analysis'. The 'PARTICIPANTS' section shows '2 participant(s) selected' and a toolbar with 'Select', 'Action', 'Participants', 'View Exceptions', and 'Expand View' (circled in red). Below is a table with columns: 'User', 'Can Delegate', 'Can Invite', 'Started', and 'Submitted'.

User	Can Delegate	Can Invite	Started	Submitted
<input type="checkbox"/> Department, Secretary (SEC)	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Secretary1, Deputy (DS1)	<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Assistant, First (FA51)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

## Expanded View

User	Organisational Structure	Can Delegate	Delegated To	Can Invite	Proxy	Open	Close	Notified	Last Reminder	Reminded	Started	Submitted
<input type="checkbox"/> Department, Secretary (SEC)	Secretary's Office	<input type="checkbox"/>		<input type="checkbox"/>						0		
<input type="checkbox"/> Secretary1, Deputy (DS1)	Business Group 1	<input type="checkbox"/>		<input type="checkbox"/>						0		
<input checked="" type="checkbox"/> Assistant, First (FAS1)	Division1	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>						0		
<input type="checkbox"/> Secretary, Assistant (AS1)	Branch1	<input type="checkbox"/>		<input type="checkbox"/>						0		

To find a participant in the list select the Control Key and F. A search box will appear at the top right of screen. Add the participant's name. All matches will be highlighted in yellow on the screen.

Note: Page numbers will appear at the bottom of the participants when there are 100 participants or more.

### Selecting Participants

Before you can perform any **Action** on a participant, they must first be selected. Individual participants can be selected or they can be selected in groups.

A participant is Selected if there is a tick in the box next to their name and their line is highlighted.

You can select individual users by clicking on the box next to their name.

You can also select groups of participants by clicking on the **Select** menu.

This function provides a drop down list of groups that can be selected:

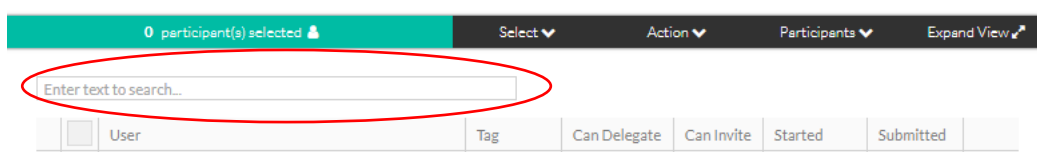
- All – All participants
- None – Deselects All participants
- No Invitation Sent – Selects participants who have not been sent an invitation email
- Submitted – Only participants that have completed and submitted their survey
- Not Submitted – Participants who have not submitted their survey. This will select participants who have not started and also participants who are still in progress.
- In Progress – Participants who have started by not submitted the survey
- Not Started – Participants who have not started the survey at all.
- Select lower levels – If this is checked, when a person is selected, any participants they manage will also be selected.

**Note:** Selecting participants from the Select button is cumulative: that is, you can Select multiple groups such as "Incomplete" and "Not Started".



## Finding Participants

Enter the name or part name of the person in the search box and press return.

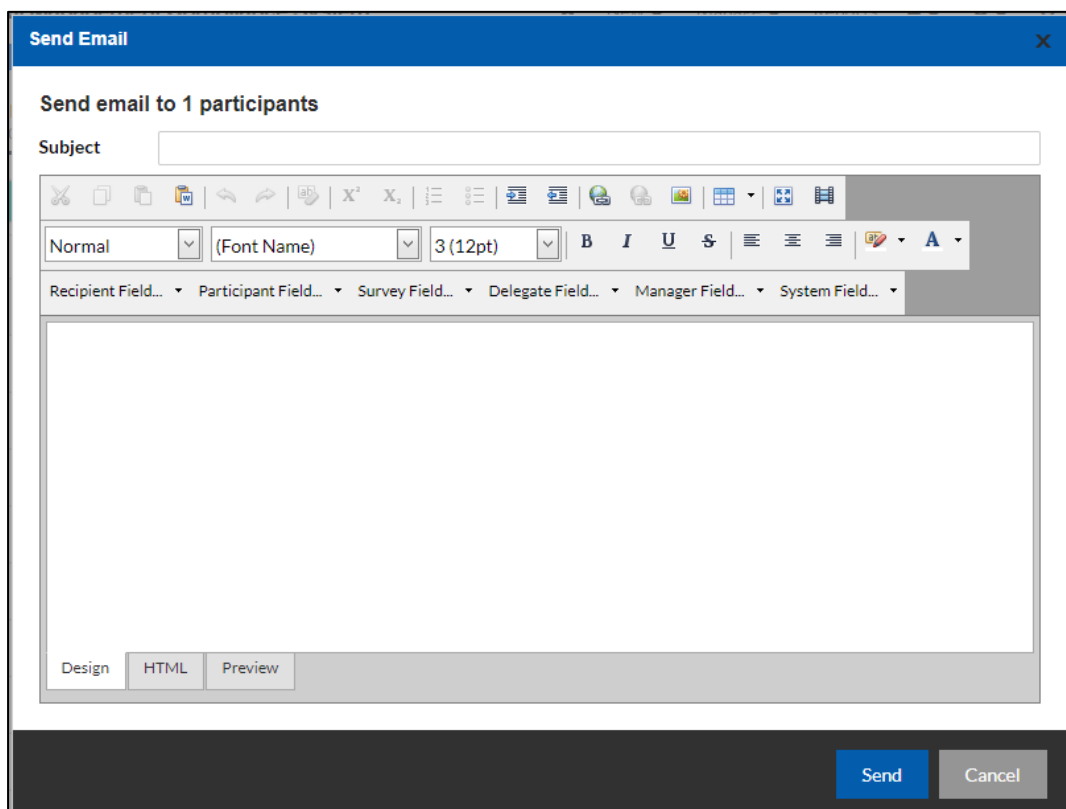


## Action Menu

Once you have selected your participants, there are several actions that can be carried out.

- **Send Email** – Allows a general email to be generated to the selected participant/s. An entry of the email will appear in the log.

The send email function utilises the 'merge fields' function.



The Subject line of the email may include one or more merge fields. A merge field is a predefined tag that when selected it will populate the relevant information into the email. For example, if you select 'Survey Title' into the 'Subject' line field the system will derive the correct Survey Name to be used in the email notification.

To populate merge fields into the Subject line:

1. Locate the required merge field by hovering over the merge categories (see list on page xx)

2. The merge field will populate into the Body of the email
  3. Cut and paste the merge field from the body to the subject. The merge field can also be typed directly into the Subject field if you know the merge fields tag.
  4. Add any merge fields and or text into the body of the email (make sure the merge field/s selected for the subject line have been removed).
  5. Select 'Send'.
- Send Invitation – By selecting a user/s, you can invite a participant to take part in a survey. Used when adding additional participants to a survey. **Note:** Will not be sent to managers who have subordinates with incomplete surveys if Restrict Manager Access is turned on.
  - Send Reminder – By selecting a user/s, you can manually send a reminder to a user/s that a survey is required to be completed. **Note:** Will not be sent to managers who have subordinates with incomplete surveys if Restrict Manager Access is turned on.
  - **Assign Can Delegate** – Gives permission to a participant to Delegate their survey to someone else to fill out. A tick in the **Delegate** column indicates this permission has been given.  
**Note:** A delegate must Submit the survey back to the original participant for final Submission. However, a Proxy can Submit a survey on behalf of the Participant.
  - Re-delegate – Permission can be given for survey delegates to redelegate to another delegate. This allows a survey to be passed between any number of people prior to final submission by the participant. See "Allow delegates to redelegate" option in survey configuration.
  - **Unassign Can Delegate** – Withdraws permission for a participant to Delegate their survey to someone else to complete.
  - **Assign Can Invite** – Gives permission to a participant to Invite others to the survey. A tick in the **Can Invite** column indicates this permission has been given.
  - **Unassign Can Invite** – Withdraws permission to a participant to Invite others to the survey.
  - **Set Open & Close** – Allows the Survey Manager to limit the Open & Close dates for the selected participant **within** the Open & Close dates of the Survey set in the Design screen.
  - Change Owner – Changes the participant nominated in a survey to a different participant. Allows responsibility for a survey response to be transferred to a different person.
    - Select the participant you want to move the survey response from;
    - Select the 'Action' function;
    - Select 'Change Owner'
    - Enter the new Owner

The survey response will now show as assigned to the new user.

- Set Tag and Message – Select this option to set a Tag (a field to uniquely identify all surveys for a single participant) and Message (a personalised message to be provided for each survey response).
- **Assign Proxy** – allows the Survey Administrator to nominate a Proxy for this participant. The proxy can submit a survey on another’s behalf.
- **Remove Proxy** – Withdraws permission for a proxy to complete the survey.
- **Add Supervisor as Participant** – Add a new participant and add their supervisor as listed in the organisational structure, as their manager to the survey.
- **Assign Manager** – Assign a manager to an existing participant.
- **Set Supervisor as Manager** - Sets the supervisor of an existing participant as listed in the organisational structure as the participant’s manager in the survey.
- **Remove Manager** – Removes the manager for the selected participant.
- **Reopen Responses** – Reopens the participant’s survey for editing and resubmission.
- **Clear Responses** – Deletes all responses in the participant’s survey, allowing the participant to start again. Responses may only be cleared if the participant’s survey is currently open.
- **Delete Participant** – removes a participant from the survey.

## Exceptions

An exception is a response that differs from the usual responses in a survey. Survey administrators can configure questions to trigger exceptions when a particular response is selected against a survey question. The ‘Exceptions’ tab shows all exceptions logged within a response. A survey manager can view all exceptions.

Click on the **Exceptions** tab to see all those participants who answered any question with an answer that indicates an exception.

Note: The Survey Administrator sets up the Exception indicators.

## Columns

**Note:** Show all columns or hide columns by toggling the **Compress/Expand View** button.

- User: Name and login of users to Manage.
  - Tag: The Tag field is used to uniquely identify all surveys for a single participant.
  - Message: Enter a personalised message to be provided for each survey response. This message appears between the survey at the top of the survey preamble and the first question.
- Classification: APS grade of the user

- Organisational Structure: Where in the Org Structure the user comes from.
- Can Delegate: Tick indicates the user has been given permission to delegate their survey.
- Delegated To: The name of the user the participant has delegated their survey to.
- Can Invite: Tick indicates the user has been given permission to invite other participants to the survey.
- Proxy: The name of the user the survey has been sent to for completion on their behalf. Only Module Administrators can create a Proxy.
- Open: This date overrides the survey open date just for the selected participant.
- Close: This date overrides the survey close date just for the selected participant.
- Notified: Date the user was originally notified about the survey.
- Last Reminder: Date the user was most recently reminded to complete the survey.
- Reminded: The number of times the user has been reminded to complete the survey.
- Started: The date the user began the survey.
- Submitted: The date the user submitted the survey.
- View: Once a participant has started their survey, the Manager can view the survey by clicking on the "View". Note: editing of other participant's survey is not permitted.

## Closing a Survey

A survey will automatically close based on the close date entered in the configuration for the individual survey. Once the Close date has been passed participants will no longer be able to access the Survey.

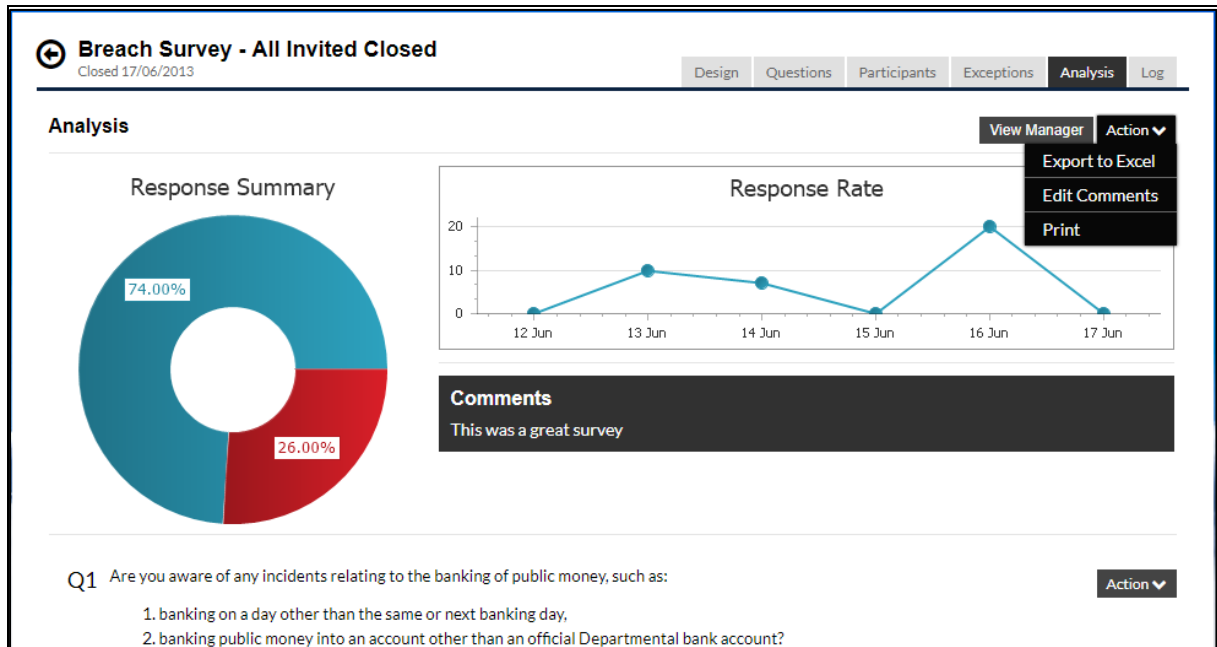
The Close date can be changed by the Survey Administrator should this be required.

To change the Closing date go to Manage Survey (type) > Select the survey > **Design Tab** for the survey and over-write the closing date. Select the **Save** button.

## Analysing the Results of a Survey

Results from the survey are visible only to the Survey Administrator. Participants can be granted access to view survey results through the permissions tab.

To analyse and export data for this survey, click the **Analysis** tab in the top right of screen.



A summary showing the status of invitations and responses is presented at the top, including any comments entered for this survey as a whole.

### Action Menu

**Export to Excel:** To export survey response to excel includes responses to all answers.

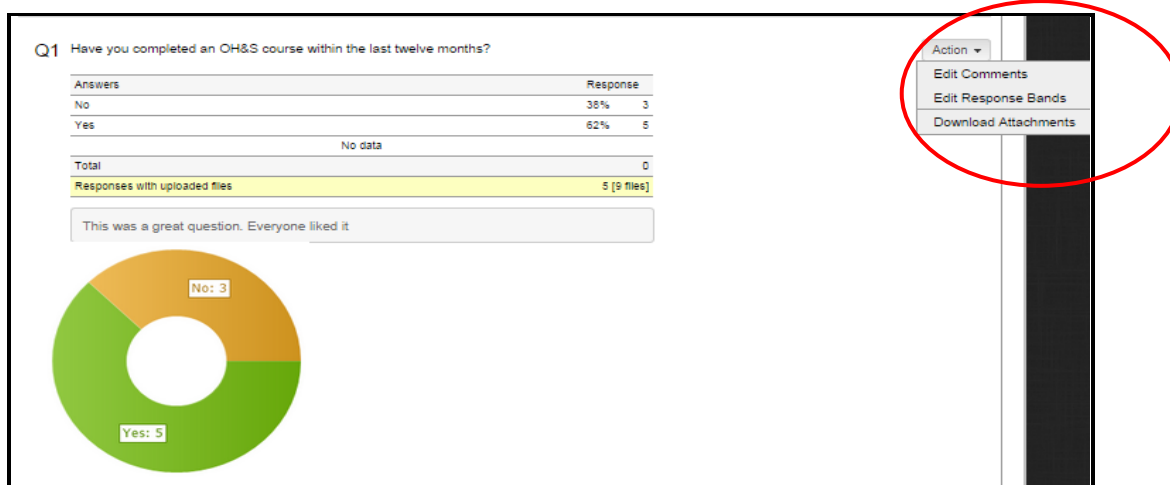
**Edit Survey Comments:** To edit the comments for the survey as a whole.

**Download Attachments:** Downloads all the attachments participants uploaded as part of their response to the survey.

**Print:** Prints the Analysis screen with all charts.

## Question Analysis

Question data is displayed below the survey summary, showing tabulated responses and, where applicable, a graph of the data.



**Comments** for each question can be managed by selecting **Edit Comments** from the question's Action menu. Comments are displayed in-line with the question.

### Response Bands

You are able to create aggregate banding for responses by selecting **Edit Response Bands** from the question's **Action** menu. To add a new band Select **Add New**, or select an existing band from the drop-down menu to edit. Provide a label and select the responses to be included in this band. Note that numeric and date response types allow start and end values for the band rather than individual responses.

1. Enter the description for this band
2. Selecting **Include all unbanded responses** will catch all otherwise unbanded responses and aggregate them into this band.
3. Indicate Y/N for responses
4. Selecting **Hide this band** will stop the responses in this band from appearing in the analysis screen and from being exported to Excel.
5. Save

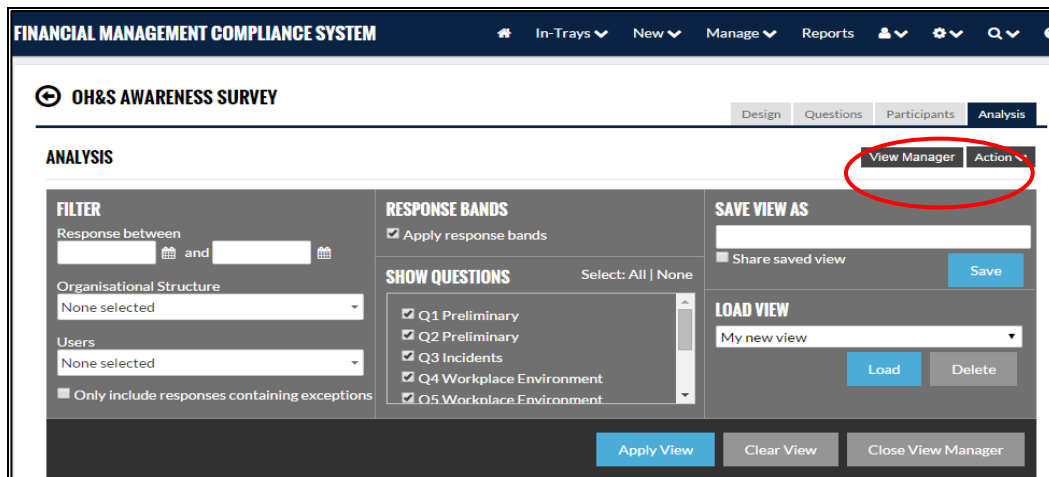
To edit an existing band select a value from the drop down menu.

**Download Attachments** will download all attachments participants uploaded for this Question only. The download attachments option will only display if attachments are saved against a question.

## Filtering Survey Results

The View Manager function allows the results of the survey to be filtered by a number of different criteria.

Select the View Manager tab to define the filters.



Filters can be applied across the following criteria:

**Date:** a date range of when a response was submitted.

**Organisational Structure:** Use the drop down box to select one or multiple areas of the organisational structure.

**Users:** Select individual or multiple users from the search field.

**Exceptions:** Select the tick box to view only those responses containing exceptions.

**Response Bands:** Apply Response Bands (raw data vs banded aggregates).

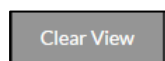
**Questions:** Filter on one or more questions.

**Save View As:** Once the filters have been applied, the View can be given a name and saved for retrieval at a later time. Select the **Share saved view** box to allow other Administrators to view this saved filter.

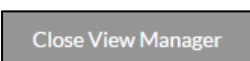
**Load View:** Retrieve a previously saved filter.



Applies all the filter criteria selected.



Removes all the filter criteria selected.



Closes the View Manager.

**Note:** Filter views do not apply to the Response Summary Chart, only to the individual questions.

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